Roles, (sub)accounts and permissions.

TransFollow makes use of different levels of users. We have sub-users for the TransFollow Portal and the TransFollow drive. Both users can be generated in the TransFollow Portal, put to active or inactive and assigned to transports. Next to that, we have certain roles with certain permissions and required actions.

Accounts

Once you have created an account you have registered to the TransFollow Portal. All your company information is registered in 'Company' under the administrative settings.

(Sub)accounts to use the TransFollow Portal
You can add new users to the TransFollow Portal in the 'User' screen, enabling them to use the TransFollow Portal.
Click on 'create new user'. Fill in the Surname, name, email address, username, the role (user,admin) and if the user is active or inactive. Check the box of 'Admin' if the new user also should have admin settings.

Manage admin settings or activity
You can manage the (sub)accounts for the TransFollow Portal in the user overview and put the users in active or inactive and change the checkbox to give the user admin settings.
This account this is not able to log-in to the TransFollow Drive application. The users for TransFollow Drive, can be created in the 'Assets'.

Roles within TransFollow

TransFollow supports different roles for each transport and a role gives a set of permissions. The role is indicated during the creation of the transport mission. During the creation, the submitter will indicate the consignor, the consignee, the client and the carrier. With these role, specific actions are required.
The carriers, consignors, consignees and clients can be added to the partner library in 'Partners'. This way, you can easily select a partner when you are creating a transport, or when you give the party permissions.

Submitter
The submitter is the entity creating and issuing a transport. Giving the submitter role will allow your partner to view and modify transport information.
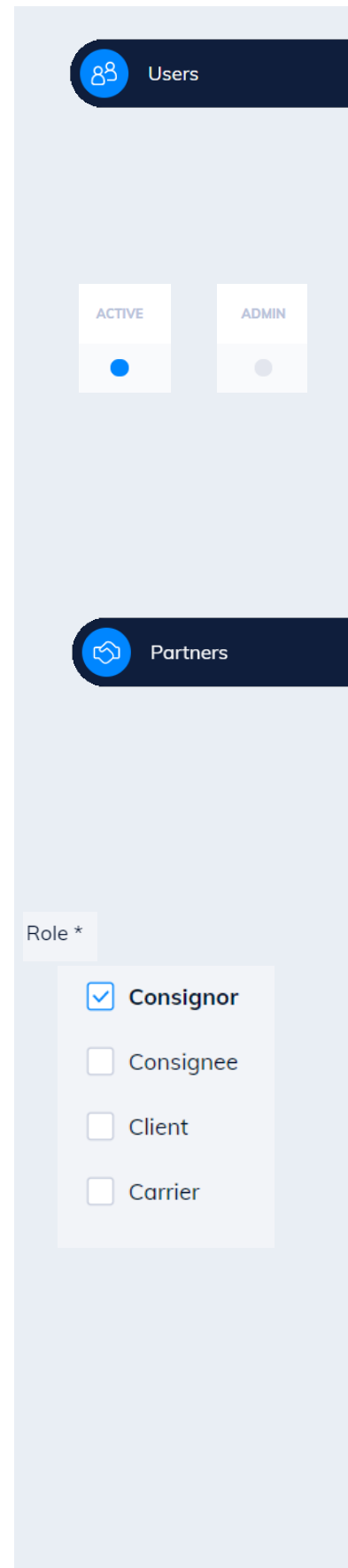
Carrier
The carrier is or are the entities mentioned as carriers on the transport. Giving the carrier role will allow your partner to modify some information on the transport (like goods items, vehicle, drivers...), to manage transports through the TransFollow Drive Application and to sign consignment notes on behalf of the carrier.

Consignor
The consignor is or are the entities mentioned as consignors on the transport. Giving the consignor role will allow your partner to sign the consignment notes on behalf of the consignor.

Consignee
The consignee is or are the entities mentioned as consignees on the transport. Giving the consignee role will allow your partner to sign the consignment notes on behalf of the consignee.

Share access and permissions

Share transport access and permissions with external partners in the 'Manage Transport' screen. You can only give the roles you own on this transport and let them act as a specific role:

- Allows partner to act as a submitter
- Allows partner to act as a carrier
- Allows partner to act as a consignor
- Allows partner to act as a consignee
- Allows partner to act as a client

Select partner to which you want to grant access to this transport or enter the partner TransFollow email address. Please note that your partner must be connected to TransFollow systems with the email you mention below. In case you have a doubt please contact your partner to know which address email he is using to connect to TransFollow system.

TransFollow Drive Accounts

The TransFollow Drives accounts can be created in the 'Assets' in the TransFollow Portal. You can click on the 'createdriver' or 'create vehicle' button. With TransFollow Drive Mobile application, your driver will be able to manage all transports and missions for which they are assigned to.
Please note that if you added an email address to your driver, he will receive an email containing a link to the TransFollow Drive application and the login details you set.

Driver account

When creating a driver, you indicate the surname, name, phone number and the email of the driver.
Next to that, you can immediately indicate whether you would like the driver to:

- **Allow freight documents creation:** This will enable the driver using the device linked to the vehicle to create freight documents from the TransFollow Drive mobile application. Please note that each freight document created by your driver will deduct one transport credit from your credit balance.
- **Chang password on first login:** The first time the user will log in the TransFollow Drive mobile application, the application will require that the user changed the password.
- **Request GPS tracking:** The application will request your driver to accept to enable GPS tracking while using TransFollow Drive mobile application.

Vehicle account

When indicating an account for a vehicle, you create a account dedicated to an vehicle. Next to that, you can immediately indicate whether you would like the vehicle account to:

- **Allow freight documents creation:** This will enable the driver using the device linked to the vehicle to create freight documents from the TransFollow Drive mobile application. Please note that each freight document created by your driver will deduct one transport credit from your credit balance.

To put the TransFollow Drive accounts from active to inactive, you can click on the account and click on edit.

Assets

CREATE NEW DRIVER

CREATE NEW VEHICLE

● Active   ○ Inactive